Engaging Patients in Quality Improvement

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Learning Objectives

Purpose: Equip health care organizations and teams with tools and strategies to engage patients in QI activities to improve patient experience and health outcomes.

Participants will be able to

- Explain why engaging patients in quality improvement is important

- Describe several strategies to engage patients in improvement work

- Describe aspects of care that could be improved through the involvement of patients

What it means and why it is important

What is patient engagement?

What is patient engagement?

- Involve patients in decisions about their health care

- Include patients in practice improvement efforts

- Partner with patients in policy and research

Involving patients in decisions about their health care

- Information sharing

- Self-management of conditions

- Shared decision-making

- Patient safety

Adapted from: Engaging Patients and Families in the Medical Home, AHRQ (link)

Including patients in practice improvement efforts

- Gather input on care experience
- Patient advisory councils or committees
- Patient input on practice workflow
- Patient participation on QI project teams

Adapted from: Engaging Patients and Families in the Medical Home, AHRQ (link)

Partnering with patients in policy and research

- Patient representation on QI or Policy committees and boards
- Co-design programs and services
- Participate in training for clinicians or care team

Adapted from: Engaging Patients and Families in the Medical Home, AHRQ ([link](#))

Gathering Activity

In what ways does your organization currently engage patients in quality improvement?

Please enter response to the question above in the chat box.

Why is Patient Engagement Important?

"In a growing number of instances where truly stunning levels of improvement have been achieved...

Leaders of these organizations often cite—putting patients and families in a position of real power and influence, using their wisdom and experience to redesign and improve care systems—as being the **single most powerful** transformational change in their history."

Reinertsen, J. L., Bisagnano, M., & Pugh, M. D. Seven Leadership Leverage Points for Organization-Level Improvement in Health Care, 2 nd Edition, IHI Innovation Series, 2008. Available at www.ihi.org.

Why is Patient Engagement Important?

- Patients bring a unique perspective to discussion and decision-making

- Patients can provide a reality check about how they access and experience care

- Patients can highlight challenges from practice inefficiencies

- Patients can share what helps them or what serves as a barrier to them managing their health

View of Patient Engagement From the Field

- Video Clip
- http://www.ihi.org/education/IHIOpenSchool/resources/Pages/Activities/Bintz-EngagingPatients.aspx

IHI Open School. Why Should Patients be Part of Improvement Work? Features Marilu Bintz, MD; Gundersen Health System in La Crosse, WI

Is patient engagement happening in practice?

A survey of 112 patient-centered medical home practices in 22 states found that:

- 90% used at least one method to gather patient feedback (e.g. survey)

- 63% gather input through interviews, focus groups, or patient "walk-throughs"

- 32% involved patients in a continuing role in QI or patient advisory councils

- 29% had high level of patient engagement (patient advisors <u>and</u> surveys)

What does patient engagement in QI look like?

Different levels of engagement

Level of Effort	Examples of Patient Engagement
Low	Patient Surveys
Medium	One-on-One Interviews Focus Groups Patient "walk-throughs" Digital Engagement
High	Patient Partners: • Patient Advisory Councils • Patients serving on QI project teams

Surveys

- Surveys offer opportunities for patients and family members to provide feedback on their experience or ideas they have for improving care delivery

- Surveys can answer specific questions posed in the planning phase of an improvement project

Effort: Low

- Define what feedback is needed
- Determine what patients to include in a survey
- Find the right method for conducting a survey
- Analyze input received

Surveys

- Considerations:
  - Dedicate time for survey development, collection and analysis
  - Plan for any costs
  - Ensure language used is patient-centered (i.e., no jargon)
  - Be clear how patient input will be used and shared
  - Address workflow impacts in planning
  - More frequent/ timely surveys may be more relevant

- Examples of Patient Surveys
  - Suggestion book or comment cards in waiting room
  - Brief web survey via patient portal
  - Patient Experience survey (e.g., CAHPS)
  - Case Study: Northeast Valley Health Corporation pulse survey

We Want Your Feedback

Interviews

- One-on-one interview with a patient around a QI project, measure, and/or experience receiving care at the clinic.
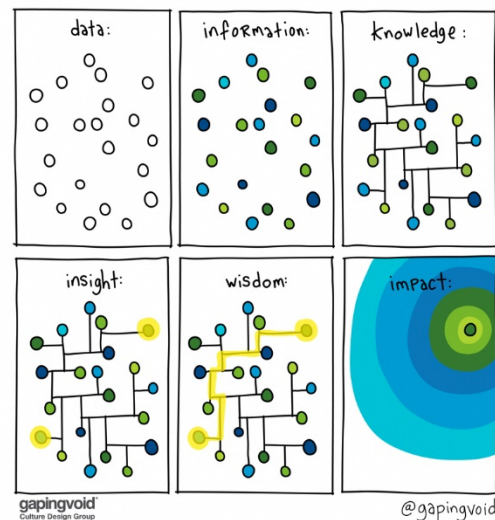
Effort: Medium

- – Easier to find one person to participate
- – Conversations can be extensive

Interviews

Considerations:

- Avoid applying one person's experience to everyone else's.
- Establish clear expectations.
- Show appreciation

Focus Groups

- Bringing a group together to discuss a QI project, measure area, and/or their experience receiving care at clinic.

Effort: Medium

- Health Care is a unique setting.
- Can be diagnosis focused.

Focus Groups

- Be aware of the pluses and minuses of a group dynamic.

- Come prepared: facilitator's guide, relatable, open ended questions.

- Try brainstorming and discussion techniques to get participation from everybody.

Digital Engagement

- Engaging patients in QI activities through digital platforms.

Platforms Include:

- Patient Portal
- Social Media
- Automated text and call systems
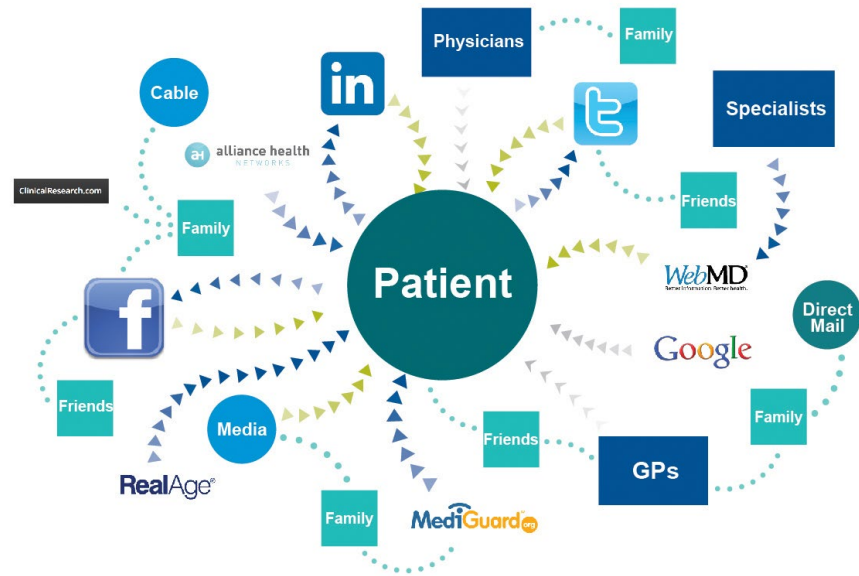
Effort: Medium

Digital Engagement

Considerations

- Does your clinic's social media activity result in higher quality care?

- Is there a two-way street?

- Are you actually engaging patients in QI on these platforms?

- Project and Data Transparency

Walk-Throughs

- A scheduled and organized walk-through of part or parts of the clinic with a patient in order to get feedback on clinic layout, processes, and procedures.

Medium Effort:

- Scheduling
- Orienting on the purpose
- Focusing observations

Walk-Throughs

- Test without patients: IHI
- Test with patients: IPFCC
- Tie-ins: focus groups and patient advisory councils
- Not a clinic tour!

Patients Partners

"Practices often struggle with the 'fires' of the day, making it difficult to focus on larger constructs such as patient-centered care.

The participation of Patient Partners on
practice improvement teams keeps the importance of improving patient care at the forefront of discussion."

- Rosemary DenOuden, Humboldt IPA

Patient Partners

Patient Advisory Council

- Broad representation
  - Organization-level

- Variety of project work
  - Education Materials
  - Survey Development
  - Secret Shopper

Patients as QI Team Members

- Targeted representation
  - Clinic/Team-level

- Focused topic or project
  - Diabetes
  - Depression Screening
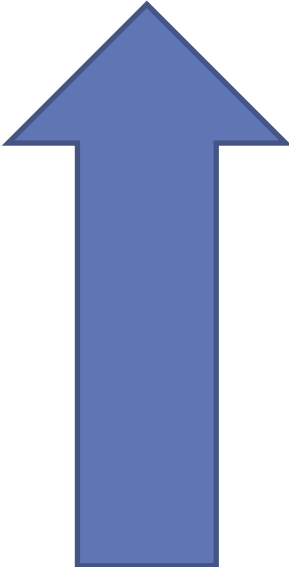 - Substance Use Treatment

Patient Partners
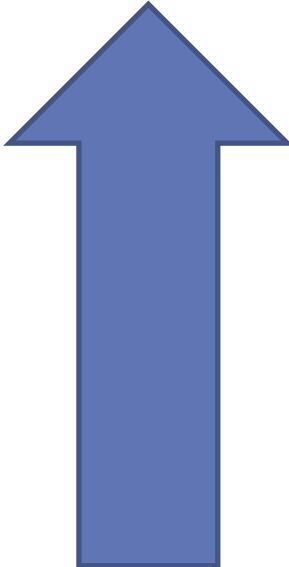

Aligning Forces for Quality | Improving Health & Health Care in Communities Across Humboldt County

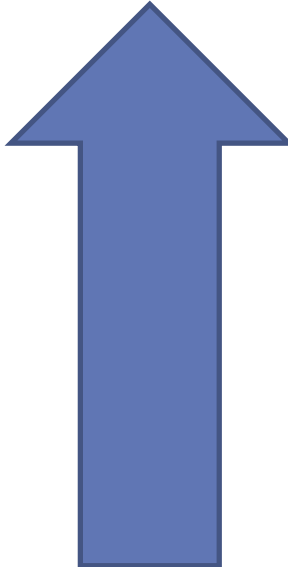An initiative of the California Center for Rural Policy and the Robert Wood Johnson Foundation.
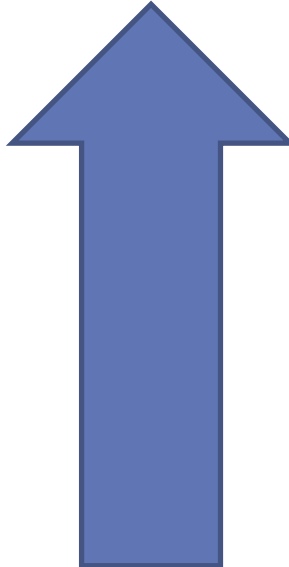
Patient Partners

Patient Partners

Patient Advisory Sample Agenda: (90-120 minutes)

- Welcome
- Gathering Activity (patient story, training, teambuilding)
- Action Items from last time
- Co-design of materials/processes
- Review of Action Items moving forward
- Adjourn

Patient Partners

Considerations:

- Focus area(s) of the council or the project
- Roles and responsibilities of patients and staff
- Appropriate recruitment
- Coordinator or Point of Contact
- Regular, convenient meeting time
- Clear agenda and appropriate asks
- Patient and staff engagement and training
- Feedback and data loop

Patient Partners

Effort:

- [Assess Organization Readiness](#)
- [Recruitment of patients](#)
- [Enagement and Training of patients and staff](#)
- [Planning and facilitating meetings](#)
    - Guided Storytelling
- Tracking action items
- [Adequate funding](#)

Taking Action on Patient Feedback Activity

Let's Try It

Empathy Mapping

Empathy Map Canvas

| Designed for: | Designed by: | Date: | Version: |

① WHO are we empathizing with?
Who is the person we want to understand?
What is the situation they are in?
What is their role in the situation?

GOAL

② What do they need to DO?
What do they need to do differently?
What job(s) do they want or need to get done?
What decision(s) do they need to make?
How will we know they were successful?

⑦ What do they THINK and FEEL?

PAINS
What are their fears,
frustrations, and anxieties?

GAINS
What are their wants,
needs, hopes and dreams?

③ What do they SEE?
What do they see in the marketplace?
What do they see in their immediate environment?
What do they see others saying and doing?
What are they watching and reading?

⑥ What do they HEAR?
What are they hearing others say?
What are they hearing from friends?
What are they hearing from colleagues?
What are they hearing second-hand?

What other thoughts and feelings might motivate their behavior?

④ What do they SAY?
What have we heard them say?
What can we imagine them saying?

⑤ What do they DO?
What do they do today?
What behavior have we observed?
What can we imagine them doing?

Last updated on 16 July 2017. Download a copy of this canvas at http://gamestorming.com/empathy-map/

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Step 1: Project team meets to clarify purpose of empathy mapping activity

WHO

* Patients (45-75 years old) due for a colorectal cancer screening

DO

* Know their options
* Decide on the right option for them
* Complete their screening

GOAL

50% of patients aged 50-75 years of age will complete their colorectal cancer screening within the appropriate timeframe.

Step 2: Collect patient perspectives through interviews, focus group, PAC
Step 3: Map out results into SAY, THINK, DO, FEEL buckets
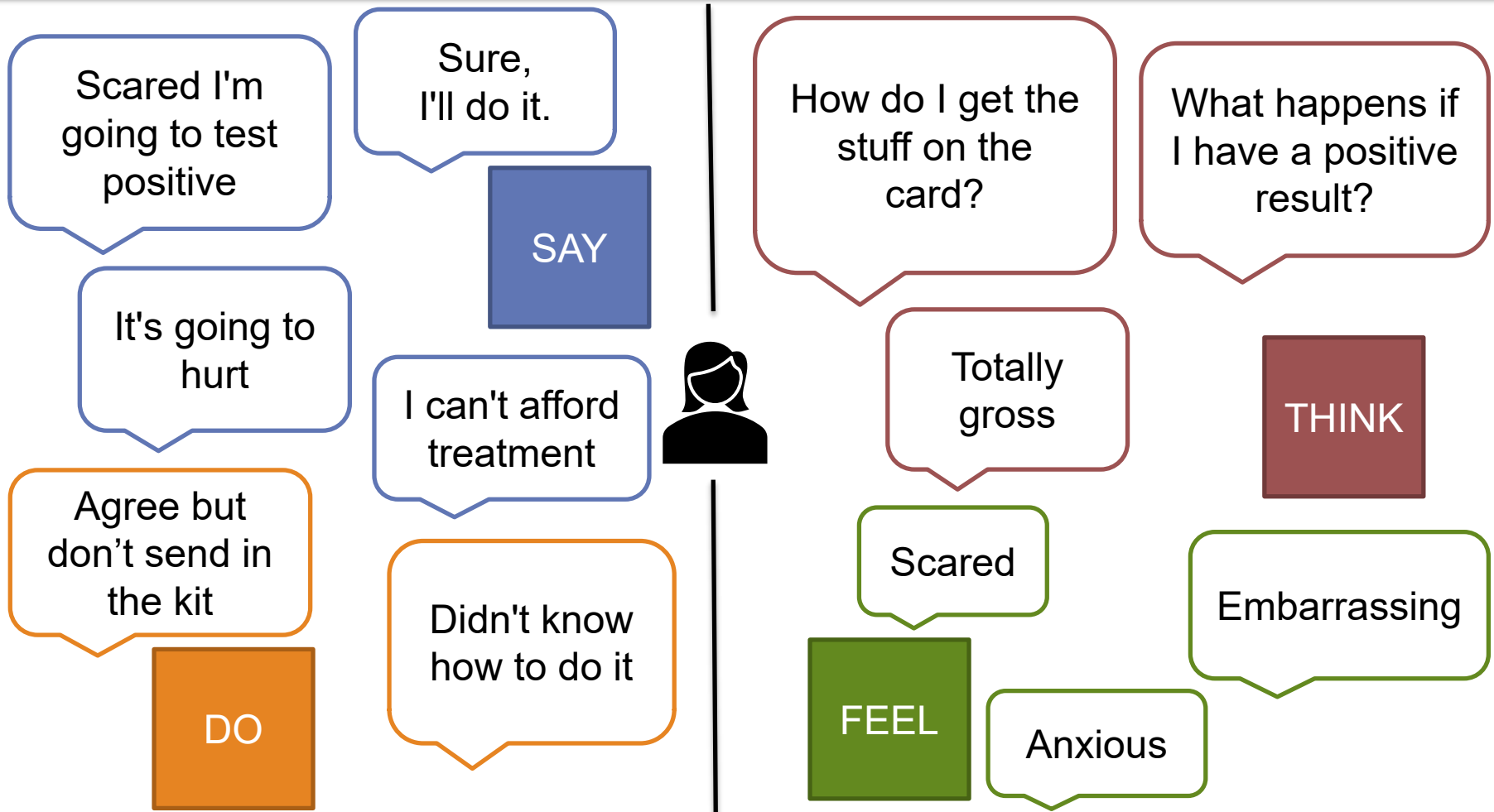
Step 4: Discuss observations and identify themes
Step 5: Brainstorm change ideas
(ideally returning to patients for input)

Scared

- Active Listening
- Risk-Benefit
- Cost
- Community Resources

Anxious

- Shared Decision Making
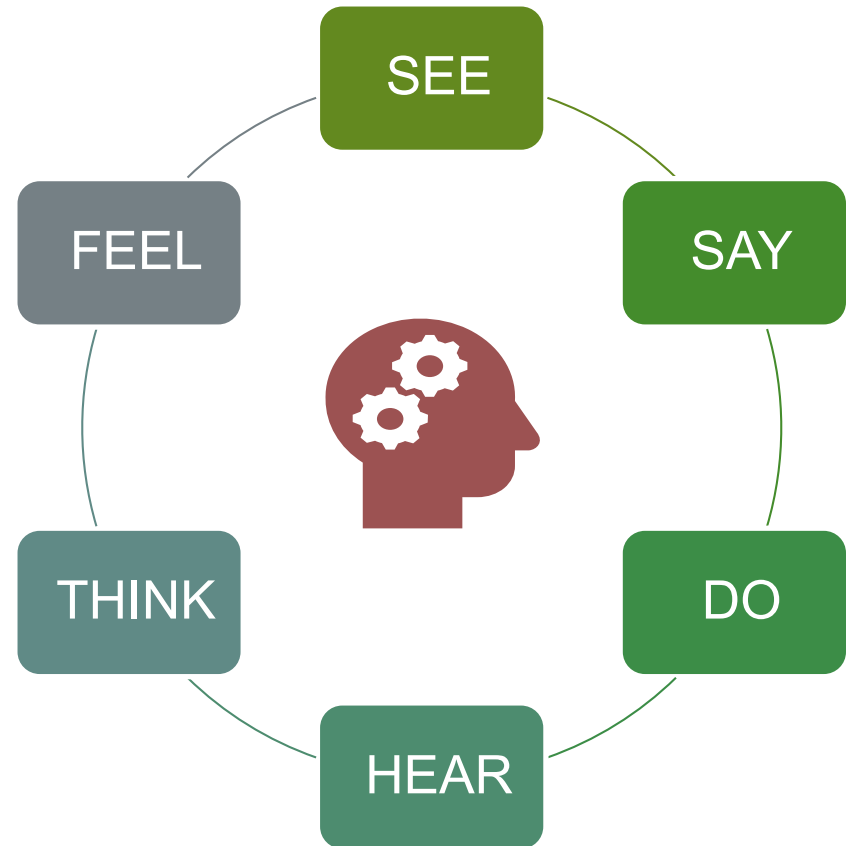- Explain the process

Knowledge

- Demo of kit
- Tips and Tricks

Activity

Empathy Mapping: COVID Vaccine

Write your responses into the chat or raise your hand to be unmuted.

Empathy Mapping

- Gather data (patient perspectives)
  - Individual interviews
  - Focus Group
  - Patient Advisory Council
- Use a map to showcase your learnings
  - Empathy Mapping ([Mind Tools](#)) ([CCI-Catalyst](#))
- Look for patterns or themes
- Identify areas for improvement
- Brainstorm ideas for addressing areas of concern
  - "[How Might We](#)..."
  - [Concept sheets](#)

Where do I Start?

Where Do I Start?

Assess Current Patient Engagement Efforts
- Which strategies do you already have in-place?
- Which in-place strategies already have a QI component or focus?
- Which are missing a QI component?
- Ease of start vs impact.

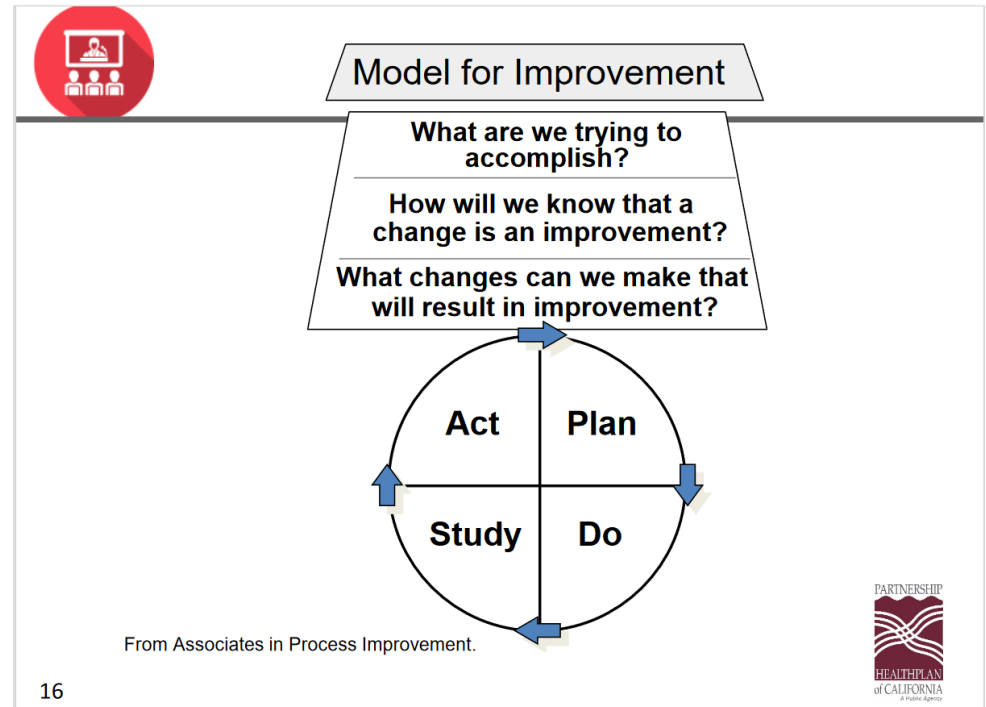# Re-evaluate a Current Patient Engagement Project Through QI Lens

- Start small or reevaluate current engagement projects.

- What are we doing with survey results?

- What changes can we test?

Where Do I Start?: Use the Model for Improvement

Starting Patient Engagement in QI:

- Actionable

- Test changes

- Changes should aim to improve quality of care

Model for Improvement

What are we trying to accomplish?

How will we know that a change is an improvement?

What changes can we make that will result in improvement?

Act | Plan
Study | Do

From Associates in Process Improvement.

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Incorporate a Patient Engagement Focus into an Ongoing Clinical PDSA

- Example: Colorectal Cancer Screening
- Add a patient engagement component: patient interview.
- Track a patient engagement measure as part of data collection plan.
- Is the CRCS campaign more successful after adding a patient engagement focus?
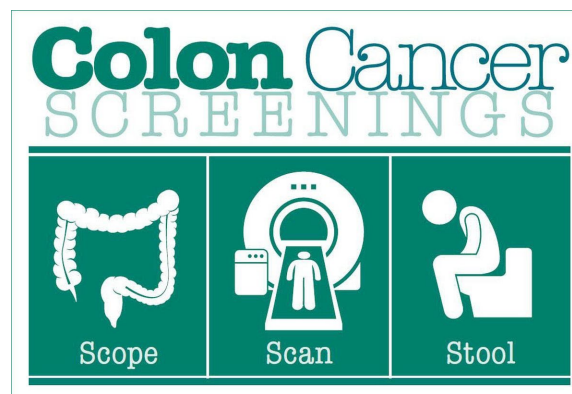
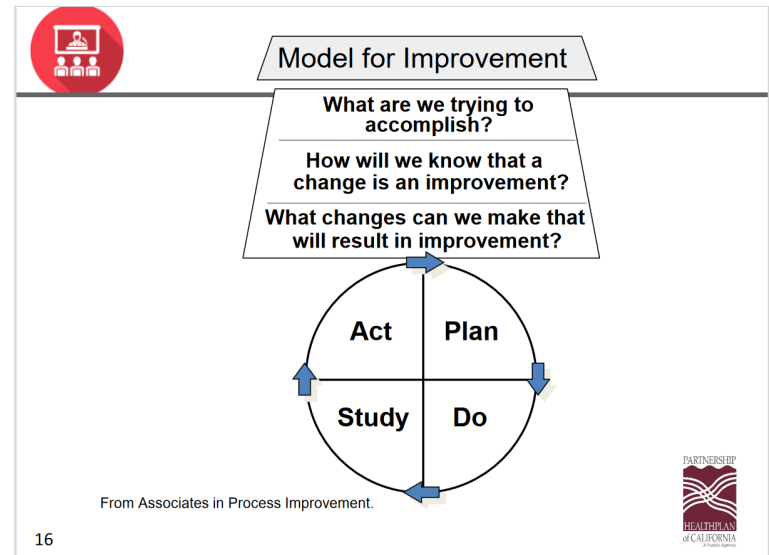# Resources

[PHC Website Resources](#)

- ABCs of QI Webinars

- Project Management

- Change Management

[HANC Website Resources](#)

- Additional Lean resources

[IHI Website Resources](#)

- Courses

- Resources

Thank you for your time and engagement!

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